



Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Required Report - public distribution

Date: 7/18/2003

GAIN Report #BE3031

Belgium-Luxembourg

Livestock and Products

Annual

2003

Approved by:

Philip A. Letarte

U.S. Embassy

Prepared by:

Yvan Polet

Report Highlights:

Pig stocks decreased further because of environmental restrictions in 2002. In 2003, this decrease will continue but at a slower pace. Pork consumption decreased by 10 percent in 2002 and is expected to stabilize in 2003 and 2004. Cattle numbers wfall due to higher slaughter rates. Beef consumption has increased to its highest level since 1995.

Includes PSD changes: Yes
Includes Trade Matrix: No
Annual Report
The Hague [NL1], BE

Executive Summary

Belgian meat consumption is increasing again. In 2002, Belgians consumed on average 36 kg of fresh red meat, 16 kg of processed meat and 13 kg of poultry and/or game meat.

Pigs and Pork

* At the end of 2003, the hog populations in Belgium/Luxembourg are expected to decline to 6.67 million and to decline even further to 6.60 million at the end of 2004. This decline will be slightly smaller than expected because environmental restrictions are not as difficult to meet as expected. This led to a reduced interest in the government production license buyback scheme. Pig numbers are forecast to continue declining in the coming years but that reduction is slowing.

* Domestic consumption of pork decreased about 5 percent in 2002, which is more than previously anticipated because of the recovery of beef and poultry consumption. In 2003, pig meat consumption is stabilizing and expected to remain unchanged through 2004.

Cattle and Beef

* The cattle herd is expected to further decrease in 2003 and in 2004. The milk cow herd is decreasing because of increasing productivity. The decrease in beef cattle numbers is due to increased slaughter as a result of a profitable market situation. The decrease in 2004 will result from the opening of the government production license buyback scheme to the cattle and poultry sectors. A reduction as a result of the EU Mid Term Review is expected from 2005 onwards.

* In 2003, beef consumption is expected to increase slightly, after a 10 percent increase in 2002 to reach the highest beef consumption level since 1995. Consumption in 2004 is forecast to remain stable.

* BSE incidence is rapidly decreasing in 2003, with only ten new cases discovered by mid July, compared to 38 cases in 2002.

PS&D's

PSD Table						
Country	Belgium-Luxembourg					
Commodity	Animal Numbers, Swine				(1000 HEAD)	
	2002	Revised	2003	Estimate	2004	Forecast
	Old	New	Old	New	Old	New
Market Year Begin		01/2002		01/2003		01/2004
TOTAL Beginning Stocks	6850	6850	6600	6676	6500	6600
Sow Beginning Stocks	692	681	675	675	0	669
Production (Pig Crop)	11420	11894	11200	11920	0	11947
Intra EC Imports	980	778	1000	725	0	750
Other Imports	0	0	0	0	0	0
TOTAL Imports	980	778	1000	725	0	750
TOTAL SUPPLY	19250	19522	18800	19321	6500	19297
Intra EC Exports	620	534	600	475	0	470
Other Exports	0	0	0	0	0	0
TOTAL Exports	620	534	600	475	0	470
Sow Slaughter	0	0	0	0	0	0
OTHER SLAUGHTER	11200	11287	11000	11300	0	11300
Total Slaughter	11200	11287	11000	11300	0	11300
Loss	830	1025	700	946	0	957
Ending Inventories	6600	6676	6500	6600	0	6570
TOTAL DISTRIBUTION	19250	19522	18800	19321	0	19297
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

PSD Table						
Country	Belgium-Luxembourg					
Commodity	Meat, Swine		(1000 MT CWE)(1000 HEAD)			
	2002	Revised	2003	Estimate	2004	Forecast
	Old	New	Old	New	Old	New
Market Year Begin		01/2002		01/2002		01/2002
Slaughter (Reference)	11200	11287	11000	11300	0	11300
Beginning Stocks	0	0	0	0	0	0
Production	1055	1089	1036	1074	0	1074
Intra EC Imports	140	129	150	115	0	115
Other Imports	0	0	0	0	0	0
TOTAL Imports	140	129	150	115	0	115
TOTAL SUPPLY	1195	1218	1186	1189	0	1189
Intra EC Exports	625	660	615	660	0	660
Other Exports	70	81	70	50	0	50
TOTAL Exports	695	741	685	710	0	710
Human Dom. Consumption	500	480	501	479	0	479
Other Use, Losses	0	0	0	0	0	0
TOTAL Dom. Consumption	500	477	501	479	0	479
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	1195	1218	1186	1189	0	1189
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

PSD Table						
Country	Belgium-Luxembourg					
Commodity	Animal Numbers, Cattle			(1000 HEAD)		
	2002	Revised	2003	Estimate	2004	Forecast
	Old	New	Old	New	Old	New
Market Year Begin		01/2002		01/2003		01/2004
Total Cattle Beg. Stks	3106	3106	2950	2948	2880	2880
Dairy Cows Beg. Stocks	625	653	600	633	0	615
Beef Cows Beg. Stocks	520	561	480	529	0	510
Production (Calf Crop)	1030	1065	1000	1025	0	1000
Intra EC Imports	80	68	100	100	0	100
Other Imports	0	0	0	0	0	0
TOTAL Imports	80	68	100	100	0	100
TOTAL SUPPLY	4216	4239	4050	4073	2880	3980
Intra EC Exports	230	264	200	200	0	170
Other Exports	0	0	0	0	0	0
TOTAL Exports	230	264	200	200	0	170
Cow Slaughter	385	397	320	340	0	320
Calf Slaughter	310	308	310	315	0	315
Other Slaughter	250	262	250	265	0	265
Total Slaughter	945	967	880	920	0	900
Loss	91	60	90	73	0	60
Ending Inventories	2950	2948	2880	2880	0	2850
TOTAL DISTRIBUTION	4216	4239	4050	4073	0	3980
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

PSD Table						
Country	Belgium-Luxembourg					
Commodity	Meat, Beef and Veal			(1000 MT CWE)(1000 HEAD)		
	2002	Revised	2003	Estimate	2004	Forecast
	Old	New	Old	New	Old	New
Market Year Begin		01/2002		01/2003		01/2004
Slaughter (Reference)	945	967	880	920	0	900
Beginning Stocks	0	0	0	0	0	0
Production	330	339	300	320	0	315
Intra EC Imports	50	46	50	55	0	55
Other Imports	5	3	5	5	0	5
TOTAL Imports	55	49	55	60	0	60
TOTAL SUPPLY	385	388	355	380	0	375
Intra EC Exports	140	135	115	125	0	120
Other Exports	10	10	5	10	0	10
TOTAL Exports	150	145	120	135	0	130
Human Dom. Consumption	235	243	235	245	0	245
Other Use, Losses	0	0	0	0	0	0
TOTAL Dom. Consumption	235	243	235	245	0	245
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	385	388	355	380	0	375
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0